



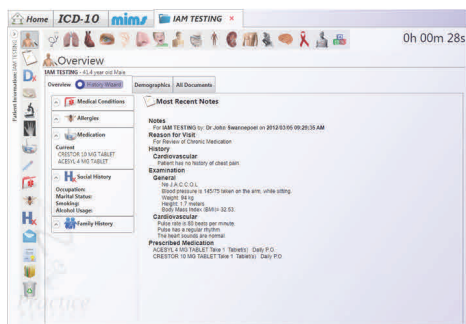
3.1 Release Guide

Practice PERFECT

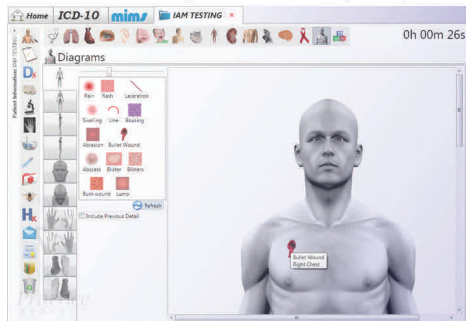
integrated Electronic Health Records.

MedEDI and Practice Perfect are proud to offer a seamlessly integrated software system which handles practice management, billing and electronic health records.

Developed in South Africa under the guidance of medical professionals this easy to use, logical, intuitive system creates accurate, legible medical records and referral letters. Available at your fingertips are various scoring tables i.e. Hamilton rating scale, mini mental tests and lots more



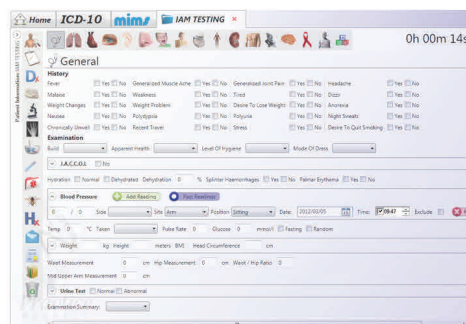
The software creates legible notes, create prescriptions etc.



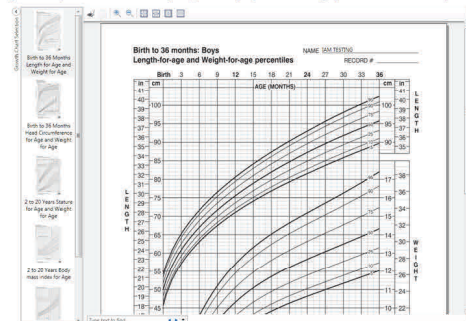
Drag and drop icons to indicate lacerations, wounds etc.

You don't have to be an artist... this incredibly easy to use software will create accurate visual representations of the injury and ailments.

You don't have to be a typist or computer boffin... just simply click predefined options, grouped in relevant sections - so no typing is required! Integration of your MedEDI Practice Management software with the Practice Perfect Electronic Health Record suite means you capture patient demographic information only once, and this information is populated on all documents.



Capture patient history by simply clicking pre-defined options.



Easy to use development charts.

Capture patient history.

Examination findings.

Record Diagnosis and Procedures performed.

Generate Prescriptions.

Keep track of Current, Chronic and Past Medication.

Manage Pathology and Radiology requests and results.

Clinical Sections:

General Section.
Respiratory.
Cardiovascular.
Eye, Ear, Nose and Throat.
Dermatology.
Gastro-intestinal.
Musculo-skeletal.
Urology.
Breast.
Gynaecology and Obstetrics.
Psychiatry.
Neurology.
Paediatrics...

Notes:

Clinical history and examination notes are generated automatically by simply clicking the relevant check boxes, in the appropriate clinical section.

Diagnosis:

Select from our IC10-code browser of make use of a custom list of conditions.

Procedures:

Easily record procedures performed.

History:

Easily review previous consultation notes, capture patient's social history and family history.

Pathology:

Generate requests forms and receive results electronically from laboratories such as Lancel, Ampath and Pathcare.

Radiology:

Rapidly generated requests, upload radiology reports and images, making future reference quick and easy.

Rx:

Generate a new prescription or simply re-prescribe from patient's list of current, chronic or past medication.

Immunisations:

Keep track of patient's immunisation history and schedules.

Conditions:

Easily review and manage the patient's current and past medical conditions as well as the patient's surgical history.

Allergies:

Capture patient's allergies and adverse reactions to drugs, ingredients and non-drug allergies.

Medical Certificates:

Generate medical certificates with just a few clicks.

Capture Medical Conditions and Surgical History.

Record Social History.

Manage Immunisation Schedules.

Capture Allergies and Adverse Reactions.

Rapidly generate Referral letters and Medical Certificates...

Referrals and Reports:

Manage incoming and outgoing correspondence, such as investigation and specialist reports. Rapidly generate referral letters to include patient's current and chronic medications as well as medical conditions, allergies and more.

Diagrams:

Draw diagrams of lacerations, bruises and other skin lesions, using predefined tools or customize your own drawing.

MIMS:

Optional electronic Mims browser for quick and easy reference. Available to Mims subscribers.



**Practice
PERFECT**

Reg. No.: 2005/005568/07

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MedEDI CPS 3.1 is the latest release of the Medical EDI Services (Pty) Limited software.

It contains all the functionality of the previous version, however, in all cases this functionality has been improved and enhanced.

This new functionality is a mix of new innovative ideas and enhancements requested by valued MedEDI customers.

All of the changes are carefully planned and have been implemented to improve the general operations of your practice, more successful claims billing and higher quality Practice administration.

This guide is a reference specifically to the new features of 3.1.

For further information regarding this release, please visit;

<http://www.mededi.co.za/release-notes-for-mededi-cps-v3-1/>

For the MedEDI user manual & online tutorials, please visit;

<http://www.mededi.co.za/user-manual/>

Allocation response.

In the case of submitted claims, should the benefit proposed by the medical scheme differ from the one originally expected, the operator can now allocate the proposed benefit amount to the bill contents as required / desired.

This process immediately displays the patient liable amount for that claim and the bill item from which that amount came.

Over and above this submission functionality, the way the claim response is displayed has been changed for easier viewing and use.

Bill Details.

Notes:

A

Bill item.

The operator can select an individual bill item by clicking on it, and by pressing A on the keyboard a new window will appear enabling the operator to enter an authorisation code. This occurs when the operator has preauthorisation for individual billed items.

Bill Patient

Bill Details

Account: TESTING, I MR 5656 Med. Aid: DISCOVERY CORE COAS... 112233445566 00
Patient: MR IAM TESTING Gender: M DOB: 10/10/1970 41 y
Doctor: SNYMAN, PF MP0394483 Ref. Dr.: Op.:
Chg. Rate: DISC* Bill Date: 03/02/2012 P.O.S: ROOMS Auth:

Diagnoses
I10 - ESSENTIAL (PRIMARY) HYPERTENSION

Bill Summary

	Code	Qty	Price	Diag	Levy	Disc.	Med. Aid	Pat Due
Consultation	0190		389.30		0.00			0.00
Administration Fee			0.00					
CHRONIC MEDICINES DISPENSED	GMED		0.00		0.00	-0.00	116.67	0.00
ACESYL 4 MG TAB		30	116.67	I10				

Bill Totals
505.97 0.00 -0.00 505.97 0.00

WARNING! This Medical Aid does not support Balance Billing. The funder may pay the Member if overcharged

Exit

Click, 'Submit Bill' to continue.

A

Allocate response.

Notes:

A

Shortfall received from scheme.

Should the benefit amount for the operators' submitted claim not match the amount claimed the claim response will immediately navigate to the, 'Allocate Response' screen. This screen notifies the operator of the difference between the amounts and asks the operator to confirm allocation of the schemes proposed benefit amount at line level.

Allocate

Allocate Response

Med Aid: DISCOVERY CORE COASTAL
Membership No: 154876526 Main Member: MR IAM TESTING
Patient: MR IAM TESTING DOB: 10/10/1970 Dep No: 00 Id No:
Account Name: TESTING, I MR Account No: 5689 Tel: Fax:
Bill No: 25450 Date of Claim: 28/11/2011 Service Date: 28/11/2011 Auth No:

CONFIRMATION RESPONSE RECEIVED 43760 3

Bill Total Amt: 505.97 Initial Amt Expected: 500.00 Current Benefit Amount: 500.00 Levy: 0.00 Discount: 0.00

Claimed: 505.97 Benefit: Pay to Provider 500.00 Pay to Member: 0.00, Balance: 0.00
Provided in partnership with Healthbridge
The Medical Aid has confirmed the receipt of your claim. This claim may be affected by the reversal and processing of other claims.
Please be aware that benefits have not been reserved, and payment is not guaranteed as a result of this claim submission.

Code	Description	Charged	Outstanding	Benefit	Med Aid	Pat Due
0190	NEW AND ESTABLISHED PATIENT...	389.30	389.30	0.00	389.30	0.00
GMED	CHRONIC MEDICINES DISPENSED	116.67	116.67	0.00	116.67	0.00

505.97 505.97 0.00 505.97 0.00

Exit

A

Allocate response.

Notes:

A Particulars of billed patient.

The billed patients details are displayed.

B Claim references.

The unique identifiers which identify this particular claim are displayed alongside the status of the claim.

C Claim response details.

The claim response detail includes information regarding the schemes response and a justification of the response.

D Bill total amount.

The bill total amount is the original total of the bill that the operator submitted to the scheme.

Allocate Response

Short fall received from Scheme, manual line allocation is now required.

Med Aid: DISCOVERY CORE COASTAL
Membership No: 154876526
Main Member: MR IAM TESTING
Patient: MR IAM TESTING
DOB: 10/10/1970
Account No: 5689
Account Name: TESTING, I MR
Bill No: 25450
Date of Claim: 28/11/2011
Dep No: 00
Tel: 5689
Service Date: 28/11/2011
Id No:
Fax:
Auth No:

Status: CONFIRMATION RESPONSE RECEIVED
Switch Ref: 43760
Funder Ref: 3
Response Code: 3

Bill Total Amt: 505.97
Initial Amt Expected: 500.00
Current Benefit Amount: 500.00
Levy: 0.00
Discount: 0.00

Claimed: 505.97 Benefit: Pay to Provider 500.00 Pay to Member: 0.00, Balance: 0.00
Provided in partnership with Healthbridge
The Medical Aid has confirmed the receipt of your claim. This claim may be affected by the reversal and processing of other claims.
Please be aware that benefits have not been reserved, and payment is not guaranteed as a result of this claim submission.

Code	Description	Charged	Outstanding	Benefit	Med Aid	Pat Due
0190	NEW AND ESTABLISHED PATIENT...	389.30	389.30	0.00	389.30	0.00
Funder Line Ref: 2554c3 Billed: 389.30, Overcharge: 5.97, Funder: 383.33, Pat: 0.00 Reason: Processed						
GMED	CHRONIC MEDICINES DISPENSED	116.67	116.67	0.00	116.67	0.00

Remaining: 500.00

Exit

A B C D

A Initial amount expected.

The initial amount expected is generated by the MedEDI software during the creation of the bill. It is based on the items the operator enters into the bill. For each of these items the program cross-references the pricing rules and regulations to the patient's medical scheme, and then estimates the benefit amount that will return.

B Current benefit amount.

The current benefit amount is the amount that the patients scheme agrees to pay for the submitted claim.

C Levy.

The levy displayed here is calculated during the original creation of the bill. The calculation of levies per item are done automatically based on scheme pricing rules.

D Discount.

The discount displayed here is calculated during the creation of the bill. The calculation of discounts per item is done automatically based on scheme pricing rules.

Allocate Response

Short fall received from Scheme, manual line allocation is now required.

Med Aid: DISCOVERY CORE COASTAL
Membership No: 154876526
Main Member: MR IAM TESTING
Patient: MR IAM TESTING
DOB: 10/10/1970
Account No: 5689
Account Name: TESTING, I MR
Bill No: 25450
Date of Claim: 28/11/2011
Dep No: 00
Tel: 5689
Service Date: 28/11/2011
Id No:
Fax:
Auth No:

Status: CONFIRMATION RESPONSE RECEIVED
Switch Ref: 43760
Funder Ref: 3
Response Code: 3

Bill Total Amt: 505.97
Initial Amt Expected: 500.00
Current Benefit Amount: 500.00
Levy: 0.00
Discount: 0.00

Claimed: 505.97 Benefit: Pay to Provider 500.00 Pay to Member: 0.00, Balance: 0.00
Provided in partnership with Healthbridge
The Medical Aid has confirmed the receipt of your claim. This claim may be affected by the reversal and processing of other claims.
Please be aware that benefits have not been reserved, and payment is not guaranteed as a result of this claim submission.

Code	Description	Charged	Outstanding	Benefit	Med Aid	Pat Due
0190	NEW AND ESTABLISHED PATIENT...	389.30	389.30	0.00	389.30	0.00
Funder Line Ref: 2554c3 Billed: 389.30, Overcharge: 5.97, Funder: 383.33, Pat: 0.00 Reason: Processed						
GMED	CHRONIC MEDICINES DISPENSED	116.67	116.67	0.00	116.67	0.00

Remaining: 500.00

Exit

A B C D

Allocate response.

Notes:

- A

Code.
Displayed as a reference, the code of each bill item is displayed at line level.
- B

Description.
The description for each code is displayed.
- C

Charged.
The charged amount is the final amount submitted for that item to the medical scheme.
- D

Outstanding.
If there have been any changes to the billed items between the time of submission of the bill and the operator opening the, 'Allocate Response' screen it will be displayed here. Changes are, for example, payments into the billed item. This field then displays the amount currently outstanding.

Allocate

Allocate Response

TESTER
06/02/12

✓ Accept Changes

✗ Discard Changes

Short fall received from Scheme, manual line allocation is now required.

Med Aid: DISCOVERY CORE COASTAL
Membership No: 154876526
Main Member: MR IAM TESTING
Patient: MR IAM TESTING
DOB: 10/10/1970
Account No: 5689
Bill No: 25450
Date of Claim: 28/11/2011
Dep No: 00
Tel: 5689
Fax: 5689
Service Date: 28/11/2011
Auth No:

Status

Switch Ref

Funder Ref

Response Code

CONFIRMATION RESPONSE RECEIVED437603

Bill Total Amt

Initial Amt Expected

Current Benefit Amount

Levy

Discount

505.97500.00500.000.000.00

Claimed: 505.97 Benefit: Pay to Provider 500.00 Pay to Member: 0.00, Balance: 0.00
Provided in partnership with Healthbridge
The Medical Aid has confirmed the receipt of your claim. This claim may be affected by the reversal and processing of other claims.
Please be aware that benefits have not been reserved, and payment is not guaranteed as a result of this claim submission.

Remaining

500.00

Code	Description	Charged	Outstanding	Benefit	Med Aid	Pat Due
0190	NEW AND ESTABLISHED PATIENT...	389.30	389.30	0.00	389.30	0.00
Funder Line Ref : 2554c3 Billed: 389.30, Overcharge: 5.97, Funder: 383.33, Pat: 0.00 Reason : Processed						
GMED	CHRONIC MEDICINES DISPENSED	116.67	116.67	0.00	116.67	0.00
		505.97	505.97	0.00	505.97	0.00

Exit

A

B

C

D

- A

Benefit.
Here the operator allocates the amount of received benefit from the medical scheme to each bill item.
- B

Medical aid due.
The Med Aid field displays the medical scheme liability for each billed item.
- C

Patient due.
The Pat Due field displays the patient liable amount for each billed item.

Allocate

Allocate Response

TESTER
06/02/12

✓ Accept Changes

✗ Discard Changes

Short fall received from Scheme, manual line allocation is now required.

Med Aid: DISCOVERY CORE COASTAL
Membership No: 154876526
Main Member: MR IAM TESTING
Patient: MR IAM TESTING
DOB: 10/10/1970
Account No: 5689
Bill No: 25450
Date of Claim: 28/11/2011
Dep No: 00
Tel: 5689
Fax: 5689
Service Date: 28/11/2011
Auth No:

Status

Switch Ref

Funder Ref

Response Code

CONFIRMATION RESPONSE RECEIVED437603

Bill Total Amt

Initial Amt Expected

Current Benefit Amount

Levy

Discount

505.97500.00500.000.000.00

Claimed: 505.97 Benefit: Pay to Provider 500.00 Pay to Member: 0.00, Balance: 0.00
Provided in partnership with Healthbridge
The Medical Aid has confirmed the receipt of your claim. This claim may be affected by the reversal and processing of other claims.
Please be aware that benefits have not been reserved, and payment is not guaranteed as a result of this claim submission.

Remaining

500.00

Code	Description	Charged	Outstanding	Benefit	Med Aid	Pat Due
0190	NEW AND ESTABLISHED PATIENT...	389.30	389.30	0.00	389.30	0.00
Funder Line Ref : 2554c3 Billed: 389.30, Overcharge: 5.97, Funder: 383.33, Pat: 0.00 Reason : Processed						
GMED	CHRONIC MEDICINES DISPENSED	116.67	116.67	0.00	116.67	0.00
		505.97	505.97	0.00	505.97	0.00

Exit

A

B

C

Allocate response.

Notes:

A Response information.

Information is displayed at line level for each billed item where there is any discrepancy. In this example, there was a shortfall in benefits received from the scheme. The information displayed at line level pinpoints where the scheme refuses to pay the full amount. Here, the operator over-charged a consultation by R5.97. Information regarding the billed item and the benefit amount received is also displayed.

B Benefit.

In this example the operator has allocated the new current benefit amount to all items on the bill. This excludes the amount the medical aid stated as an overcharge.

C Medical aid due.

Now that the allocation of the medical aid amounts has been done, the left over medical aid on claim for each item is not zero.

D Patient due.

The amount that was over charged for the consultation is now shifted to patient liable. The overall process now updates the on claim amount, immediately displaying and giving the operator a better understanding of what is to be on claim and what is to be patient liable.

Allocate Response (TESTER 06/02/12)

Short fall received from Scheme, manual line allocation is now required.

Med Aid: DISCOVERY CORE COASTAL
 Membership No: 154876526
 Patient: MR IAM TESTING
 Account Name: TESTING, I MR
 Bill No: 25450

Main Member: MR IAM TESTING
 DOB: 10/10/1970
 Account No: 5689
 Date of Claim: 28/11/2011

Dep No: 00
 Tel: 5689
 Service Date: 28/11/2011
 Id No:
 Fax:
 Auth No:

Status: CONFIRMATION RESPONSE RECEIVED
 Switch Ref: 43760
 Funder Ref: 3
 Response Code: 3

Bill Total Amt: 505.97
 Initial Amt Expected: 500.00
 Current Benefit Amount: 500.00
 Levy: 0.00
 Discount: 0.00

Claimed: 505.97 Benefit: Pay to Provider 500.00 Pay to Member: 0.00, Balance: 0.00
 Provided in partnership with Healthbridge
 The Medical Aid has confirmed the receipt of your claim. This claim may be affected by the reversal and processing of other claims.
 Please be aware that benefits have not been reserved, and payment is not guaranteed as a result of this claim submission.

Code	Description	Charged	Outstanding	Benefit	Med Aid	Pat Due	Remaining
0190	NEW AND ESTABLISHED PATIENT...	389.30	389.30	383.33	0.00	5.97	0.00
Funder Line Ref: 2554c3 Billed: 389.30, Overcharge: 5.97, Funder: 383.33, Pat: 0.00 Reason: Processed							
GMED	CHRONIC MEDICINES DISPENSED	116.67	116.67	116.67	0.00	0.00	0.00
		505.97	505.97	500.00	0.00	5.97	

Exit

A Sp (Shortcut key)

By clicking the 'Sp,' button on screen or by pressing the spacebar on the keyboard, the operator will auto allocate the remaining on claim amount for the selected billed item. If there is not enough of the benefit amount to cover this, remainder of the benefit funds will be allocated.

B A (Shortcut key)

By clicking the 'A,' button on screen or by pressing the 'A,' key on the keyboard, the operator will auto allocate the remaining on claim amount for all bill items. This will continue until there is no benefit amount left to allocate.

Allocate Response (TESTER 06/02/12)

Short fall received from Scheme, manual line allocation is now required.

Med Aid: DISCOVERY CORE COASTAL
 Membership No: 154876526
 Patient: MR IAM TESTING
 Account Name: TESTING, I MR
 Bill No: 25450

Main Member: MR IAM TESTING
 DOB: 10/10/1970
 Account No: 5689
 Date of Claim: 28/11/2011

Dep No: 00
 Tel: 5689
 Service Date: 28/11/2011
 Id No:
 Fax:
 Auth No:

Status: CONFIRMATION RESPONSE RECEIVED
 Switch Ref: 43760
 Funder Ref: 3
 Response Code: 3

Bill Total Amt: 505.97
 Initial Amt Expected: 500.00
 Current Benefit Amount: 500.00
 Levy: 0.00
 Discount: 0.00

Claimed: 505.97 Benefit: Pay to Provider 500.00 Pay to Member: 0.00, Balance: 0.00
 Provided in partnership with Healthbridge
 The Medical Aid has confirmed the receipt of your claim. This claim may be affected by the reversal and processing of other claims.
 Please be aware that benefits have not been reserved, and payment is not guaranteed as a result of this claim submission.

Code	Description	Charged	Outstanding	Benefit	Med Aid	Pat Due	Remaining
0190	NEW AND ESTABLISHED PATIENT...	389.30	389.30	383.33	0.00	5.97	0.00
Funder Line Ref: 2554c3 Billed: 389.30, Overcharge: 5.97, Funder: 383.33, Pat: 0.00 Reason: Processed							
GMED	CHRONIC MEDICINES DISPENSED	116.67	116.67	116.67	0.00	0.00	0.00
		505.97	505.97	500.00	0.00	5.97	

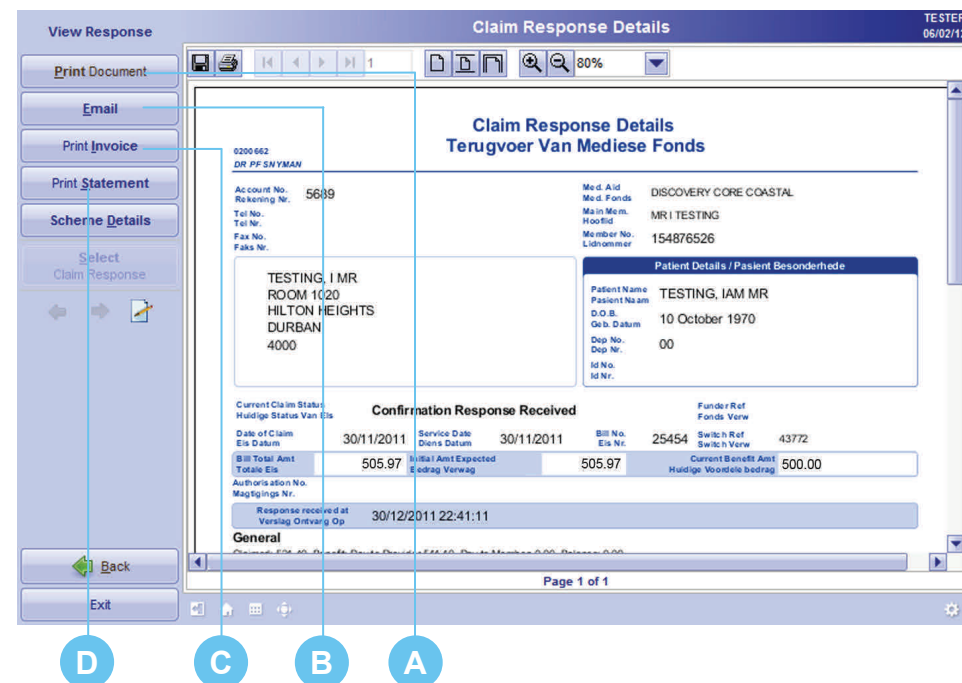
Exit

Click, 'Accept Changes' to continue.

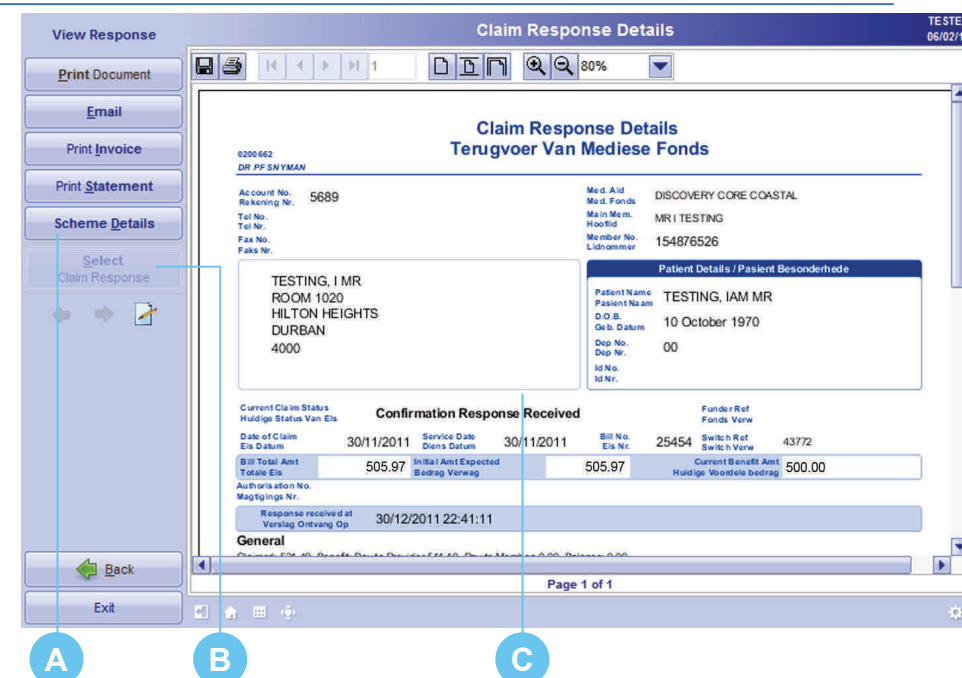
Claim response details.

Notes:

- A Print document.**
The operator is able to print the claim response document.
- B E-mail.**
The operator is able to create an e-mail to the patient with this claim response document automatically attached.
- C Print invoice.**
The operator is able to print a tax invoice based on the original created bill.
- D Print statement.**
The operator is able to print the full statement of the billed account.



- A Scheme details.**
Selecting this button will display a new window, displaying the schemes contact details and all pricing rules of the patients medical scheme. This includes the schedule of drug pricing tables and general pricing levies.
- B Select claim responses.**
If this current bill has been submitted to the patients scheme multiple times, the operator is able to browse through the responses received for that bill using the left and right arrows below, and with this button select the most appropriate response.
- C Claim response document.**
The claim response document contains all of the information relating to the claim. This information ranges from the initial bill details to the outcome of the claim. It serves as a reference to information pertaining to the claim.



Medical aid remittance.

The layout of the remittance allocation screen has been amended to improve the display of the details, and to lay the groundwork for future product enhancements.

When selecting an account, all outstanding bills are now displayed at line level, enabling the operator to allocate into individual bill items.

Included on this screen is a wide range of new functions and shortcut keys.

These amendments ensure that the remittance process is less time consuming and easier for the operator to perform.

Record Remittance.

Notes:

- A

Description.
This is the name of the Scheme from whom the operator has received the remittance advice.
- B

Reference number.
This number is transcribed from the remittance advice, or is the receipt number allocated to the remittance advice by the operator.
- C

Date.
This is the date of the remittance advice.
- D

Check Total.
This is the amount paid to the provider by the Medical scheme, as reflected on the remittance advice.

Choose an Option

Add Payments for Account

Accept and Close Remittance

Save Remittance for Later

Discard Changes

Record Remittance

TESTER 06/02/12

DescriptionRef. No.DateCheck TotalTotalDifference

DISCOVERYDIS120206337406/02/20121000.000.001000.00

Payments

Acc.	D.O.S	Description	Patient	Amount	Med. Aid	Pat. Due	Wr. Off

0.000.000.000.00

A

B

C

D

- A

Total.
This is the total amount of the remittance that has been allocated into outstanding bill items.
- B

Difference.
The difference displays what is left of the remittance after allocation, or the amount that is overallocated when allocations have exceeded the remittance check total.
- C

Add payments for account (Shortcut)
This short cut will navigate the operator to a new screen where one can select an account and allocate the remittance into outstanding bill items.

Choose an Option

Add Payments for Account

Accept and Close Remittance

Save Remittance for Later

Discard Changes

Record Remittance

TESTER 06/02/12

DescriptionRef. No.DateCheck TotalTotalDifference

DISCOVERYDIS120206337406/02/20121000.000.001000.00

Payments

Acc.	D.O.S	Description	Patient	Amount	Med. Aid	Pat. Due	Wr. Off

0.000.000.000.00

A

B

C

Record Remittance.

Notes:

A G (Shortcut key)

By clicking the G button on screen or pressing the G button on the operators' keyboard the short cut will automatically generate a unique Ref. No. and insert it into the Ref. No. input field.

B S (Shortcut key)

By clicking the S button on screen or pressing the S button on the keyboard the short cut will navigate the operator to the general suspense account screen. Here the operator allocates the remittance to a suspense account which is not linked to any of the patient accounts on system. Amounts here do not alter financial amounts on system, they are temporarily stored until a final decision to publish and where to publish.

Click, 'Add Payments for Account' to continue.

Add payments for account.

Notes:

A Account no.

Find a patient on the system using their Account no. If the operator does not know the Account no, press F3 and search for an account using other methods.

B Financial overview.

The Financial overview displays the outstanding amount in more detail for a quick reference. It reflects the amount outstanding from the medical scheme, the patient liable amount, and for how many days these amounts have been outstanding.

C Expand financial overview.

The operator is able to expand the financial overview for a more detailed breakdown by simply clicking this button.

Add payments for account.

Notes:

- A Outstanding.**
The totals displayed here are the outstanding amounts for patient liable and on claim for the different date ranges.
- B On claim.**
The totals displayed here are the amounts on claim from the scheme for the various days outstanding.
- C Liable.**
The totals displayed here are the amounts liable by the patient for the different date ranges.

Choose an Option

☒ Accept Changes
☐ Discard Changes

Add Payments for Account TESTER 06/02/12

Account Details

Account No.	Name	Filing Ref
5656	TESTING, I MR	

Outstanding

Out.	Cur	1541.64	30	60	90+	Una.	-300.00
1241.64	1142.40	1142.40					
99.24	399.24						-300.00

Payment Details

Amount to Allocate:

Items

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30			389.30	0.00	389.30
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84

Exit

A **B** **C**

- A Unallocated amounts.**
If there were any amounts not allocated to any bills, the amounts will be displayed here under the unallocated column for the different time periods.
- B Bills.**
The items are arranged in groups to make up the entire original bill. Bills are distinguished by blue and white colour coding.
- C Bill items.**
The individual items which were billed will be displayed here on a line level. i.e. there is a record for each item.

Choose an Option

☒ Accept Changes
☐ Discard Changes

Add Payments for Account TESTER 06/02/12

Account Details

Account No.	Name	Filing Ref
5656	TESTING, I MR	

Outstanding

Out.	Cur	1541.64	30	60	90+	Una.	-300.00
1241.64	1142.40	1142.40					
99.24	399.24						-300.00

Payment Details

Amount to Allocate:

Items

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30			389.30	0.00	389.30
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84

Exit

B **C** **A**

Add payments for account.

Notes:

A

Amount to allocate.

The operator can enter the amount from the remittance advice for a specific account into this space to help with allocation to the bills outstanding.

B

Amount allocated.

As the operator allocates amounts into bill items, the amount allocated will be updated here displaying the total amount allocated for this account.

C

Remainder amount.

The unapplied amount of the remittance after allocation will be displayed here. This gives the operator a reference as to how much is left to allocate into bills on this account.

D

Charged amounts column.

This column displays the original amount charged for each bill item.

Choose an Option

✓ Accept Changes
✗ Discard Changes

Exit

Add Payments for Account TESTER 06/02/12

Account Details

Account No. 5656 Name TESTING, IMR Filing Ref

Out: 1241.64 30 60 90+ Una. -300.00 Claim 1142.40 Liab. 99.24

Payment Details

Amount to Allocate: 1000.00 0.00 1000.00

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30			389.30	0.00	389.30
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84
			1541.64	1541.64	0.00	0.00	1142.40	399.24	1541.64

D

A

B

C

A

Outstanding amounts column.

This column displays the amount outstanding for each bill item at the point of entry to the allocation screen.

B

Amount column to enter payment.

The operator can allocate the amount paid from the medical scheme to the selected bill by either typing in the amount paid, or selecting enter to apply the full amount outstanding for that line.

C

Write off column.

The operator can write off an amount outstanding on a billed item.

D

Medical aid column.

This column displays the total amount of outstanding medical scheme liability after the operator has entered an allocation amount for the selected bill item.

Choose an Option

✓ Accept Changes
✗ Discard Changes

Exit

Add Payments for Account TESTER 06/02/12

Account Details

Account No. 5656 Name TESTING, IMR Filing Ref

Out: 1241.64 30 60 90+ Una. -300.00 Claim 1142.40 Liab. 99.24

Payment Details

Amount to Allocate: 1000.00 89.30 910.70

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30	89.30		0.00	300.00	300.00
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84
			1541.64	1541.64	89.30	0.00	763.10	699.24	1452.34

A

B

C

D

Add payments for account.

Notes:

A

Patient due column.

This column displays the total amount for patient liable after the operator has made a medical aid allocation for a selected bill item.

B

Balance column.

The balance displays the total amount left outstanding on the bill item after an allocation amount has been made. This feature is particularly handy when the liable amount is split between medical scheme and patient liable.

C

Allocation amount into bill item.

In this example an amount of the remittance has been allocated into this on-claim liable bill item.

D

Remainder after allocation.

By default the amount remaining after allocation has automatically been transferred to patient liable.

Choose an Option

✓ Accept Changes
✗ Discard Changes

Exit

Add Payments for Account TESTER 06/02/12

Account Details

Account No. 5656 Name TESTING, I MR Filing Ref

Out: 1241.64 30 60 90+ Una -300.00 Claim 1142.40 Liab. 99.24

Payment Details

Amount to Allocate: 1000.00 89.30 910.70

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30	89.30		0.00	300.00	300.00
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84
			1541.64	1541.64	89.30	0.00	753.10	699.24	1452.34

Sp B A O M P C S

A **C** **D** **B**

A

Spacebar (Shortcut key)

By pressing the space bar on the keyboard or clicking the 'Sp,' button on screen, the operator can automatically allocate the amount outstanding to the currently selected billed item.

B

B (Shortcut key)

By selection of the 'B,' button on screen or by pressing 'B,' on the operators keyboard, all of the medical scheme outstanding amounts for the currently selected bill will have their outstanding amounts allocated to them.

C

A (Shortcut key)

By selection of the 'A' button on screen or by pressing 'A,' on the operators keyboard, all of the medical scheme outstanding amounts across all bills on the selected account will have their outstanding amount allocated to them.

D

O (Shortcut key)

By pressing 'O' on the keyboard or clicking the 'O,' button on screen, the operator can automatically allocate all outstanding amounts for both medical aid liable and patient liable for this chosen account.

Choose an Option

✓ Accept Changes
✗ Discard Changes

Exit

Add Payments for Account TESTER 06/02/12

Account Details

Account No. 5656 Name TESTING, I MR Filing Ref

Out: 1241.64 30 60 90+ Una -300.00 Claim 1142.40 Liab. 99.24

Payment Details

Amount to Allocate: 1000.00 89.30 910.70

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30	89.30		0.00	300.00	300.00
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84
			1541.64	1541.64	89.30	0.00	753.10	699.24	1452.34

Sp B A O M P C S

A **B** **C** **D**

Add payments for account.

Notes:

A M (Shortcut key)

By selecting the M button on screen or by pressing M on the operators keyboard, the remainder after allocation can be transferred back to medical scheme liable.

B P (Shortcut key)

By selecting the P button on screen or by pressing P on the operators keyboard, the remainder after allocation can be transferred back to patient liable.

C S (Shortcut key)

By selecting the S button on screen or by pressing S on the operator's keyboard, the operator will be navigated to the suspense account screen. Here the operator allocates the amount to a suspense account which is linked to the currently selected account. Amounts allocated to this linked suspense account do not change the financial details of the account itself; they are temporarily stored until a final decision to accept and publish.

Choose an Option

✓ Accept Changes
✗ Discard Changes

Exit

Add Payments for Account TESTER 06/02/12

Account Details

Account No. 5656 Name TESTING, IMR Filing Ref

Out: 1241.64 30 60 90+ Una. -300.00 Claim 1142.40 Liab. 99.24

Payment Details

Amount to Allocate: 1000.00 89.30 910.70

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30	89.30		0.00	300.00	300.00
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84

1541.64 1541.64 89.30 0.00 753.10 699.24 1452.34

Sp B A O M P C S

A B C

A C (Shortcut key)

By selecting the C button on screen or by pressing C on the operator's keyboard, a new window will be displayed on the operators screen. Here the operator can split up the outstanding amount liable on the bill item between both medical scheme and patient liable.

B Split remainder.

In this example the liable amount has been split between patient liable and medical scheme liable. This was done by using the 'C,' shortcut.

Choose an Option

✓ Accept Changes
✗ Discard Changes

Exit

Add Payments for Account TESTER 06/02/12

Account Details

Account No. 5656 Name TESTING, IMR Filing Ref

Out: 1241.64 30 60 90+ Una. -300.00 Claim 1142.40 Liab. 99.24

Payment Details

Amount to Allocate: 1000.00 89.30 910.70

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
18 Jan 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30	89.30	0.00	150.00	150.00	300.00
18 Jan 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
18 Jan 12	GMED ACUTE M...	MR IAM TES...	92.70	92.70			92.70	0.00	92.70
19 Jan 12	0190 NEW AND ...	MR IAM TES...	352.40	352.40			0.00	352.40	352.40
19 Jan 12	GMED ACUTE M...	MR IAM TES...	46.84	46.84			0.00	46.84	46.84

1541.64 1541.64 89.30 0.00 903.10 549.24 1452.34

Sp B A O M P C S

A B

Click, 'Accept Changes' to continue.

Record remittance.

Notes:

A

Save remittance for later.

The operator can save the current remittance allocation. All the information will be saved as a remittance record so the operator can return and continue with the allocations at a later date.

B

Allocation record.

This reflects all the bills to which the operator has allocated funds. All allocation records will accumulate here until the operator is finished and ready to Accept and Close the Remittance.

C

Validation warning.

When the operator has forgot to enter something into a required input field or where there is something which requires the operators attention, the validation warning will be displayed clearly showing the sections which require the operators attention. In this instance, the remittance cannot be accepted and closed until it has been fully allocated.

D

Remove allocation record.

Using this shortcut the operator can remove any allocation record that is currently selected.

Choose an Option

Record Remittance

TESTER 06/02/12

Add Payments for Account

Description DISCOVERY Ref. No. DIS1202063374 Date 06/02/2012 Check Total 1000.00 Total 89.30 Difference 910.70

Accept and Close Remittance

Save Remittance for Later

Discard Changes

Acc.	D.O.S	Description	Patient	Amount	Med. Aid	Pat. Due	Wr. Off
5656	18 Jan 2012	0190 NEW AND ESTABLISHE...	MR I TESTING	89.30	239.30	-150.00	0.00

Exit

89.30 239.30 -150.00 0.00

A B C D

Suspense accounts.

The suspense account is an added functionality in the software product.

The suspense account itself is made available during the remittance process.

It is used for temporarily storing amounts of a medical scheme remittance.

This is particularly useful when the operator is unsure where the remittance should be allocated so the operator can store it for allocation at a later time.

Record remittance.

Notes:

A S (Shortcut key)
By selecting the 'S,' button on screen or pressing the 'S,' button on the operators keyboard the short cut will navigate the operator to the general suspense account screen. Here the operator allocates the remittance to a suspense account which is not linked to any of the patient accounts on system. Amounts here do not alter financial amounts on system; they are temporarily stored until a final decision on when and where to publish.

Click, 'S' to continue.

Add suspense account payments.

Notes:

A Description.
The description will enable the operator to find and work on this suspense amount in the future.

B Amount.
Here the operator can select how much of the medical scheme remittance to allocate into the suspense account.

Click, 'Accept Changes' to continue.

Record remittance.

Notes:

A

Unlinked suspense record.

The suspense record displays the amount of the remittance which was allocated into the suspense account. As it has only just been allocated into the suspense account, it is not yet linked to any account on system; thus it is an unlinked suspense item.

Record Remittance

Choose an Option

Add Payments for Account

Accept and Close Remittance

Save Remittance for Later

Discard Changes

Exit

Description: DISCOVERY, Ref. No.: SUSTEST, Date: 07/02/2012, Check Total: 300.00, Total: 100.00, Difference: 200.00

Acc.	D.O.S	Description	Patient	Amount	Med. Aid
SUSP9999		UNLINKED AMOUNT ON SUSPENSE ACCO...		100.00	100.00

Click, 'Add Payments for Account' to continue.

A

Add payments for account.

Notes:

A

S (Shortcut key)

By selecting the 'S,' button on screen or by pressing 'S,' on the operator's keyboard, the operator will be navigated to the suspense account screen. Here the operator allocates the remittance to a suspense account which is linked to the currently selected account. Amounts allocated to this linked suspense account do not change the financial details of the account itself, they are temporarily stored until a final decision to publish.

Add Payments for Account

Choose an Option

Accept Changes

Discard Changes

Exit

Account Details

Account No.: 6565, Name: TESTING, I MR, Filing Ref:

Out: 1108.57, 30, 60, 90+, Una., Claim, 1108.57, Liab., 0.00

Payment Details

Amount to Allocate:

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
07 Feb 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30			389.30	0.00	389.30
07 Feb 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
07 Feb 12	GMED ACUTE M...	MR IAM TES...	58.87	58.87			58.87	0.00	58.87

1108.57, 1108.57, 0.00, 0.00, 1108.57, 0.00, 1108.57

Sp, B, A, O, M, P, C, S

Click, 'S' to continue.

A

Add suspense account payments.

Notes:

A

Suspense allocation record.

The operator is able to make multiple allocations into the suspense account. As there is an account selected in the, 'add payments for account' screen, all suspense records made here will be linked to the selected account. The description entered in this example reflects that the amount is linked to an account on system. Having linked suspense items essentially means that the money is temporarily held in the suspense account until the operator is 100% certain that it should go into the selected account.

Choose an Option

Accept Changes

Discard Changes

Exit

Add Suspense Account Payments

Account: SUSP9999 | Suspense Account | Tel: Cell:

Description	Amount
LINKED AMOUNT TO ACCOUNT 6565 ON SUSPENSE ACCOUNT	200
	0

0.00

A

Click, 'Accept Changes' to continue.

Add payments for account.

Notes:

A

Suspense record on account.

Once the linked suspense item has been created, a record will be displayed under the selected accounts items. This record contains the descriptions of the suspense item that the operator previously entered.

Choose an Option

Accept Changes

Discard Changes

Exit

Add Payments for Account

Account Details

Account No. 6565 | Name TESTING, IMR | Filing Ref

Out: 1108.57 | 30 | 60 | 90+ | Una. | Claim 1108.57 | Liab. 0.00

Payment Details

Amount to Allocate:

Date	Desc	Pat	Chg	Outst.	Amount	WO	Med Aid	Pat Due	Bal.
	LINKED AMOUN...				200.00		0.00	0.00	0.00
07 Feb 12	0190 NEW AND ...	MR IAM TES...	389.30	389.30			389.30	0.00	389.30
07 Feb 12	1101 TONSILLE...	MR IAM TES...	660.40	660.40			660.40	0.00	660.40
07 Feb 12	GMED ACUTE M...	MR IAM TES...	58.87	58.87			58.87	0.00	58.87

1108.57 | 1108.57 | 200.00 | 0.00 | 1108.57 | 0.00 | 1108.57

A

Click, 'Accept Changes' to continue.

Record remittance.

Notes:

A

Linked suspense record.

The linked suspense record will display the account that the allocation is linked to, the description that the operator entered as well as the amount of the allocation. The operator is able to double click this record to return to the account that this suspense record is linked to.

Choose an Option

Add Payments for Account

Accept and Close Remittance

Save Remittance for Later

Discard Changes

Record Remittance

TESTER 07/02/12

DescriptionDISCOVERYRef. No.SUSTESTDate07/02/2012Check Total300.00Total300.00Difference0.00

Acc.	D.O.S	Description	Patient	Amount	Med. Aid
SUSP9999		UNLINKED AMOUNT ON SUSPENSE ACCO...		100.00	100.00
6565		LINKED AMOUNT TO ACCOUNT 6565 ON S...		200.00	200.00

300.00300.00

Click, 'Accept and Close Remittance' to continue.

Record / Allocate payments.

Notes:

A

Remove saved remittance

In the case of remittance records that the operator saved for later, the operator is able to click to highlight them on this screen, then select this remove button to delete them. This will delete all of the remittance allocations and remove all trace of that remittance.

Choose an Option

Record Patient Payment

Record Medical Aid Remittance

Record Credit Journal

View / Print Remittances

View Unallocated Payments

View Over Paid Payments

Record / Allocate Payments

TESTER 06/02/12

Open Remittances

Ref. No.	Created	Batch Date	Source / Description	Check Total	Batch Total
123456	19 Apr 2011	19 Apr 2011	DISCOVERY	10,000.00	7,618.54
123456789	16 May 2011	16 May 2011	PARMED	1,000.00	19,511.80
123456789	16 May 2011	17 May 2011	DCMED	100.00	100.00

11100.0027230.34

Click, 'Back' to continue.

Main menu.

Notes:

Date	Priority	Description
3 Feb 2012 11:59 PM	1	There are active Reminders which require your attention
19 Jan 2012 7:56 AM	2	Collect Payment from MR I TESTING (Acc: 5656)
18 Jan 2012 3:59 PM	2	Collect Payment from MR I TESTING (Acc: 5656)
30 Dec 2011 10:41 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:41 PM	1	Initial Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:41 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:41 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:41 PM	1	Initial Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:41 PM	1	Initial Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Initial Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for WORKMANS COMPENSATION, T MR (8956)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Initial Claim result received for WORKMANS COMPENSATION, T MR (8956)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, T MR (4309)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Initial Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Initial Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Confirmation Claim result received for TESTING, I MR (5689)
30 Dec 2011 10:39 PM	1	Initial Claim result received for TESTING, I MR (5689)

Click, 'View Account Info' to continue.

Choose an account.

Notes:

A

Linked suspense account.

The operator is able to select an account here, either by inserting the account number directly into the input field, or by using the F3 advanced search. Upon selection, the operator can press 'Esc' on their keyboard twice to open the shortcuts menu. On this menu select, 'View suspense items' to be navigated to the suspense account information window. Here only the suspense items which are linked to the currently selected account will be displayed.

B

General suspense account.

Selecting this will navigate the operator to the suspense account information window. This account includes all suspense items for all accounts.

Click, 'View Suspense Account' to continue.

LN	Name	Title	DOB	M/F	Med. Aid	No.	Dep No
----	------	-------	-----	-----	----------	-----	--------

Date	Ref	Code	Description	Diagnosis	Amount
------	-----	------	-------------	-----------	--------

B

A

Suspense account transactions.

Notes:

A Reverse transaction.

Upon selecting a financial suspense record on the right, the operator can reverse it by selecting this button. If the suspense amount was allocated and published into an account, the operator can simply find that credit journal on the account and reverse it from there.

B Record credit journal.

The operator is able to record a credit journal into the suspense account. This credit will sit as an unlinked suspense amount on the account until the operator allocates it.

C Record debit note.

The operator is able to record a debit note into the suspense account. These debit notes sit on the suspense account alone, they cannot be transferred into an account on system. They are there for the practice as a general debt recording purpose. Credit journals on the suspense account can be allocated to the debit note in order to pay it off.

D Filter.

The filter gives two options: the operator can select to show reversed suspense records and to show records which have had their credit transferred to accounts on the system.

The screenshot shows the 'Suspense Account Transactions' window. On the left, there is a sidebar with buttons: 'Reverse Transaction', 'Record Credit Journal', 'Record Debit Note', and 'Transfer Credit to another Account'. Below these are icons for a printer, a document, and a funnel. Callout A points to the 'Reverse Transaction' button. Callout B points to the 'Record Credit Journal' button. Callout C points to the 'Record Debit Note' button. Callout D points to the 'Filter' icon (funnel). The main area displays a table with columns: 'Rec Date', 'Type', 'Description', 'Ref No.', and 'Amount'. The table contains two rows of data: one for 'UNLINKED AMOUNT ON SUSPENSE ACCOUNT' and another for 'LINKED AMOUNT TO ACCOUNT 6565 ON SUSPENSE ACCOUNT'. A 'Total' row at the bottom shows a value of -300.00.

A Transfer Credit to another Account.

After selection of one of the suspense records and on selecting this button, the operator can transfer the funding from the suspense account to an account on system. This can be done for general suspense records and suspense records which are linked to an account. The amount will be published to the selected account as a credit journal, from which point the operator can allocate that credit journal into outstanding bill items. Only once this process has been completed will the suspense credit make financial changes to the selected account.

B Show unlinked items only.

Selection of this tick box will filter the suspense records and only display general suspense records which are not linked to any account on system.

C Show linked accounts.

In this input field the operator can simply type out the account number of an account on system, this will filter the displayed suspense records showing only ones linked to the selected accounts. The operator is able to separate account numbers using a comma, and enter multiple accounts to see their linked suspense records.

This screenshot is similar to the one above but with different callouts. Callout A points to the 'Transfer Credit to another Account' button in the sidebar. Callout B points to the 'Show UNLINKED items only' checkbox. Callout C points to the 'Account Filter' input field at the top of the table area. The table content remains the same as in the previous screenshot.

Suspense account transactions.

Notes:

A

Unlinked suspense item.

This is an unlinked suspense record; it is not linked to a patient's account on MedEDI. Double click the item to see a list of where its credit has been allocated. From this new screen the operator can allocate the credit into any existing debt on the suspense account. It can even be allocated into other suspense items on the suspense account.

B

Linked suspense item.

This is a linked suspense record, it was created after an account was selected during the medical aid remittance. It is linked to the account that was selected; this link to a specific account acts only as a reference to the operator by reminding them of their intention. The suspense amount can be allocated into any account on system. Double click the item to see a list of where its credit has been allocated. From this new screen the operator can allocate the credit into any existing debt on the suspense account. It can even be allocated into other suspense items on the suspense account.

A

B

A

Selected suspense record.

In this example, the suspense record which was originally created and linked to an account will be processed. The link itself is a reference to help the operator; the funds can be allocated into any account in MedEDI.

B

Notes.

By selecting any of the records displayed, the notes for that record will be displayed here giving the operator full information pertaining to the selected item.

A

B

Click, 'Transfer Credit to another Account' to continue.

Transfer suspense account credit.

Notes:

- A

Select account.

The allocation screen will default to the account that was linked to the suspense item. The operator is able to change this account to another if required.
- B

Amount to transfer.

In this input field the operator can select how much of the funds to allocate. The amount will be displayed as a credit journal on the selected account. The operator is able to share the suspense amount between multiple accounts on system. In this example the full suspense amount is allocated to this linked account.

Funds Transfer

Transfer Suspense Account Credit

TESTER
07/02/12

Accept Changes

Discard Changes

Account Details

Account No. Name Filing Ref

6565 TESTING, IMR

Status Address Contact Details

NORMAL PO BOX 1020 email testing@mail.com

Type HILTON POST OFFICE Tel

DURBAN Cell 0885456545

4000 Fax

Last Pat. Pmt: None Last Remit: None Last Stmt: None Final Notice: None

Out: 1108.57 30 60 90+ Una. Claim 1108.57 Liab. 0.00

Allocation Amount

Amount to transfer 200.00 Available 200.00 Remaining 0.00

Exit

Click, 'Accept Changes' to continue.

Suspense account transactions.

Notes:

- A

Linked suspense item.

As the linked suspense item was allocated into an account on system, it is no longer visible in the suspense item list.
- B

Hide reconciled items.

The operator is able to review the allocated suspense item by unselecting this filter option. The original record of the suspense item and its allocation information will then be displayed to the operator.

View Account Information

Suspense Account Transactions

TESTER
07/02/12

Reverse Transaction

Record Credit Journal

Record Debit Note

Transfer Credit to another Account

Account Filter

Only show items linked to the following Account/s

☐ Show UNLINKED items only

Rec Date	Type	Description	Ref No.	Amount
07/02/2012	Credit Journal	UNLINKED AMOUNT ON SUSPENSE ACCOUNT	SUSTEST	-100.00

Hide reconciled items

Hide reversed items

Show All

Back

Exit

Total

-100.00

New bill history.

The way in which the operator views the history of a bill has been fundamentally changed.

The new changes ensure that it is easier for the operator to view the processing of billed items at a line level.

The line level functionality extends to payments, thereby enabling the operator to see which billed item links to an individual payment allocation.

View Transaction History.

Notes:

A Reverse transaction.

By selecting a transaction record here, the operator is able to reverse it. Reversals will reverse all allocation of the transaction. For example, when a medical aid remittance is reversed, all allocations of that remittance will also be reversed.

B Date sort.

If a bill has had on-claim changes made to it, the bill's transaction record will retain the original bills details and all on-claim adjustments will be displayed in separate transaction records. Selection of this button will merge all the on-claim adjustment records into their applicable bill record. The detail of that bill record will now be updated with the on-claim adjustments.

C Allocated suspense item.

When an account has had a suspense item transferred to it, it will then contain two records of the transfer. The first is the record indicating the origin of the suspense item; in this instance it was a medical aid remittance. The second is the actual transferred funds, this is a credit journal.

D Columns to show.

This option allows the operator to customize how many details they want to display for each transaction record by changing the number of columns that are displayed in the transaction history table.

View Account Information

View Transaction History

Account: 6565 TESTING, IMR Tel: Cell: 0885456545

Reverse Transaction

View / Print Statement

View / Print Transaction Report

Out: -200.00 30 60 90+ Una: -1308.57 Claim: 0.00 Liab: -200.00

Rec Date	Description	Patient	Ref No.	Amount	VAT	MA A...	Pat Am...	MA All...	Pat All...
07/02/20...	Bill	MR I TESTING	25468	1,108.57	136.14	1,108.57	0.00	1,108.57	0.00
07/02/20...	Medical Aid Payment		SUSTEST	0.00		-0.00	0.00	0.00	0.00
07/02/20...	Credit Journal		SUSTEST	-200.00	0.00	0.00	-200.00	0.00	0.00
07/02/20...	Medical Aid Payment		DIS1202073...	-389.30		-389.30	0.00	0.00	0.00
07/02/20...	Medical Aid Payment		DIS1202073...	-660.40		-660.40	0.00	0.00	0.00
07/02/20...	Medical Aid Payment		DIS1202073...	-58.87		-58.87	0.00	0.00	0.00
Total				-200.00		0.00	-200.00	1108.57	0.00

LINKED AMOUNT TO ACCOUNT 6565 ON SUSPENSE ACCOUNT

Back

Exit

A

B

C

D

A Filter.

By selecting the filter the operator can select whether or not to display reversed transactions. All reversed transactions are highlighted in red to distinguish them.

B Transaction record.

For all types of transactions made to and from the selected account, there will be a transaction record displayed here. All the relevant information will be displayed for each record. The operator is able to navigate to the options for the transaction itself by double clicking the record here.

C Description.

By selecting a transaction record, if there is an applicable description for that record it will be displayed here. For example, if the credit journal came from allocating a suspense item, the details of that allocation and the fact it came from a suspense account will be displayed here.

View Account Information

View Transaction History

Account: 6565 TESTING, IMR Tel: Cell: 0885456545

Reverse Transaction

View / Print Statement

View / Print Transaction Report

Out: -200.00 30 60 90+ Una: -1308.57 Claim: 0.00 Liab: -200.00

Rec Date	Description	Patient	Ref No.	Amount	VAT	MA A...	Pat Am...	MA All...	Pat All...
07/02/20...	Bill	MR I TESTING	25468	1,108.57	136.14	1,108.57	0.00	1,108.57	0.00
07/02/20...	Medical Aid Payment		SUSTEST	0.00		-0.00	0.00	0.00	0.00
07/02/20...	Credit Journal		SUSTEST	-200.00	0.00	0.00	-200.00	0.00	0.00
07/02/20...	Medical Aid Payment		DIS1202073...	-389.30		-389.30	0.00	0.00	0.00
07/02/20...	Medical Aid Payment		DIS1202073...	-660.40		-660.40	0.00	0.00	0.00
07/02/20...	Medical Aid Payment		DIS1202073...	-58.87		-58.87	0.00	0.00	0.00
Total				-200.00		0.00	-200.00	1108.57	0.00

Back

Exit

A

B

C

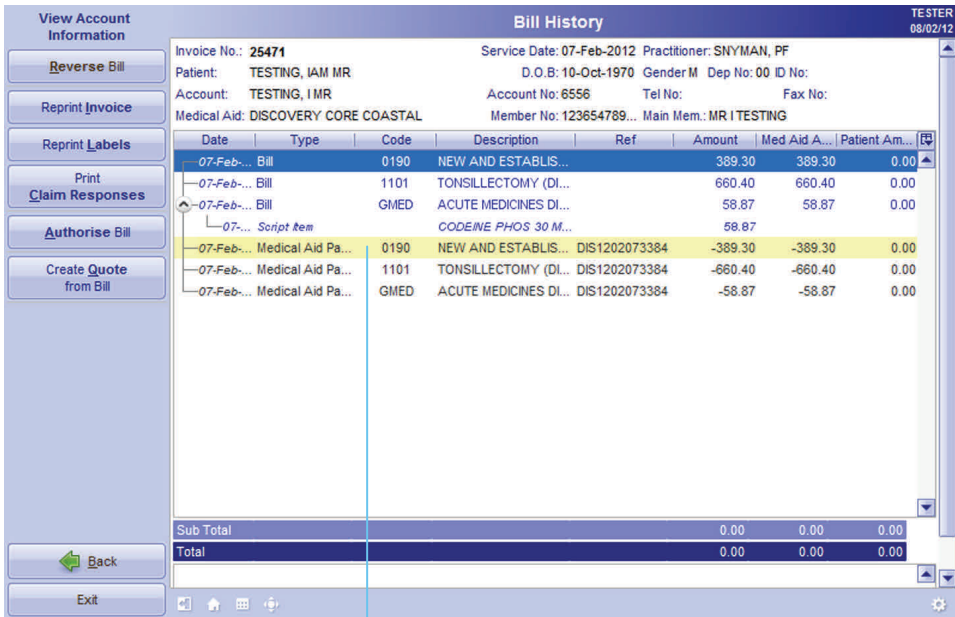
Double click, 'Transaction Record' to continue.

Bill History.

Notes:

A Selected bill linked item.

The operator is able to select a billed item by clicking on it. When selecting the item, any payments which could be allocated to that particular bill item will also be highlighted in yellow. This process shows immediately what is allocated and to where it is allocated, at line level.



View Account Information

Reverse Bill

Reprint Invoice

Reprint Labels

Print Claim Responses

Authorise Bill

Create Quote from Bill

Back

Exit

Bill History

Invoice No.: 25471

Service Date: 07-Feb-2012

Practitioner: SNYMAN, PF

Patient: TESTING, IAM MR

D.O.B: 10-Oct-1970

Gender M

Dep No: 00

ID No:

Account: TESTING, IMR

Account No: 6556

Tel No:

Fax No:

Medical Aid: DISCOVERY CORE COASTAL

Member No: 123654789...

Main Mem.: MR I TESTING

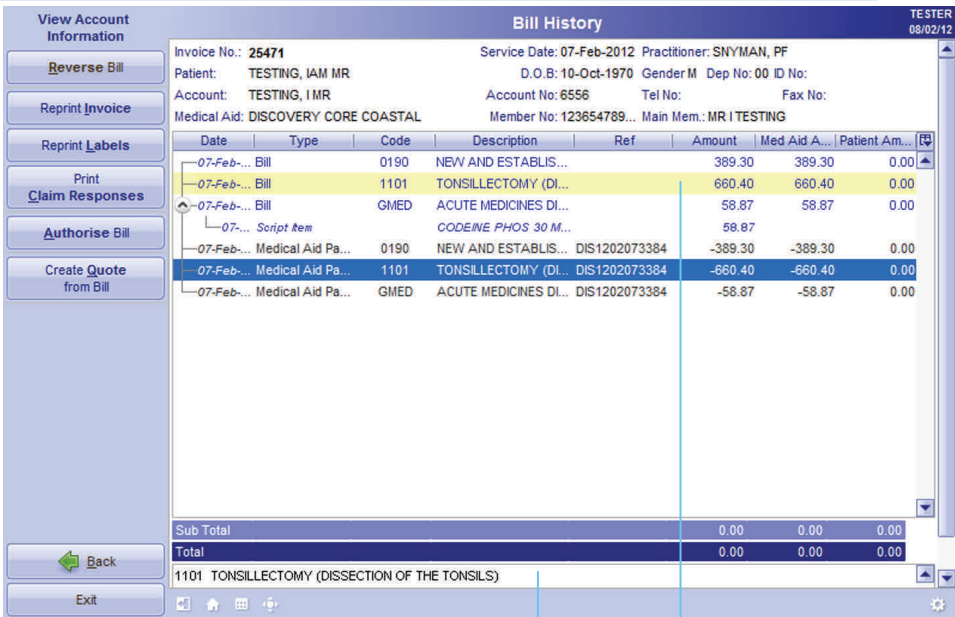
Date	Type	Code	Description	Ref	Amount	Med Aid A...	Patient Am...
07-Feb-...	Bill	0190	NEW AND ESTABLIS...		389.30	389.30	0.00
07-Feb-...	Bill	1101	TONSILLECTOMY (DI...		660.40	660.40	0.00
07-Feb-...	Bill	GMED	ACUTE MEDICINES DI...		58.87	58.87	0.00
07-...	Script Item		CODEINE PHOS 30 M...		58.87		
07-Feb-...	Medical Aid Pa...	0190	NEW AND ESTABLIS...	DIS1202073384	-389.30	-389.30	0.00
07-Feb-...	Medical Aid Pa...	1101	TONSILLECTOMY (DI...	DIS1202073384	-660.40	-660.40	0.00
07-Feb-...	Medical Aid Pa...	GMED	ACUTE MEDICINES DI...	DIS1202073384	-58.87	-58.87	0.00
Sub Total					0.00	0.00	0.00
Total					0.00	0.00	0.00

A Billed information.

By selecting an item if its available, a description of that item will be displayed here. This allows for a better understanding of the item by the operator.

B Selected item linked bill.

By clicking on a payment, it will be selected and highlighted blue. The bill item that this selected payment was allocated into will now be highlighted yellow. This shows the relationships between bills and payments at line level.



View Account Information

Reverse Bill

Reprint Invoice

Reprint Labels

Print Claim Responses

Authorise Bill

Create Quote from Bill

Back

Exit

Bill History

Invoice No.: 25471

Service Date: 07-Feb-2012

Practitioner: SNYMAN, PF

Patient: TESTING, IAM MR

D.O.B: 10-Oct-1970

Gender M

Dep No: 00

ID No:

Account: TESTING, IMR

Account No: 6556

Tel No:

Fax No:

Medical Aid: DISCOVERY CORE COASTAL

Member No: 123654789...

Main Mem.: MR I TESTING

Date	Type	Code	Description	Ref	Amount	Med Aid A...	Patient Am...
07-Feb-...	Bill	0190	NEW AND ESTABLIS...		389.30	389.30	0.00
07-Feb-...	Bill	1101	TONSILLECTOMY (DI...		660.40	660.40	0.00
07-Feb-...	Bill	GMED	ACUTE MEDICINES DI...		58.87	58.87	0.00
07-...	Script Item		CODEINE PHOS 30 M...		58.87		
07-Feb-...	Medical Aid Pa...	0190	NEW AND ESTABLIS...	DIS1202073384	-389.30	-389.30	0.00
07-Feb-...	Medical Aid Pa...	1101	TONSILLECTOMY (DI...	DIS1202073384	-660.40	-660.40	0.00
07-Feb-...	Medical Aid Pa...	GMED	ACUTE MEDICINES DI...	DIS1202073384	-58.87	-58.87	0.00
Sub Total					0.00	0.00	0.00
Total					0.00	0.00	0.00

1101 TONSILLECTOMY (DISSECTION OF THE TONSILS)

Click, 'Reverse Bill' to continue.

Bill History.

Notes:

A Reversed. The word “reversed” is automatically stamped on the bill history window. This visual representation makes for quicker reference of the bill details for the operator.

View Account Information

Reverse Bill

Reprint Invoice

Reprint Labels

Print Claim Responses

Authorise Bill

Create Quote from Bill

Back

Exit

Bill History

TESTER 08/02/12

Invoice No.: 25471 Service Date: 07-Feb-2012 Practitioner: SNYMAN, PF
Patient: TESTING, IAM MR D.O.B: 10-Oct-1970 Gender M Dep No: 00 ID No:
Account: TESTING, IMR Account No: 6556 Tel No: Fax No:
Medical Aid: DISCOVERY CORE COASTAL Member No: 123854789... Main Mem.: MR I TESTING

Date	Type	Code	Description	Ref	Amount	Med Aid A...	Patient Am...
07-Feb-...	Bill	0190	NEW AND ESTABLIS...		389.30	389.30	0.00
07-Feb-...	Bill	1101	TONSILLECTOMY (DI...		660.40	660.40	0.00
07-Feb-...	Bill	GMED	ACUTE MEDICINES DI...		58.87	58.87	0.00
07-...	Script Item		CODEINE PHOS 30 M...		58.87		
Sub Total					389.30	389.30	0.00
Total					1108.57	1108.57	0.00

View outstanding accounts.

The outstanding accounts screen has had more functionality added to it.

Along with this functionality are more options for viewing and processing accounts.

The functionality includes writing off amounts from numerous accounts.

These changes have been implemented to ensure that the operator is able to process multiple accounts in more ways, saving time and making the process easier.

Outstanding accounts.

Notes:

- A

Functions.

Selecting one of these options will change the operation the user is about to conduct. The operation that the user selects will process selected accounts on this screen.
- B

Available accounts.

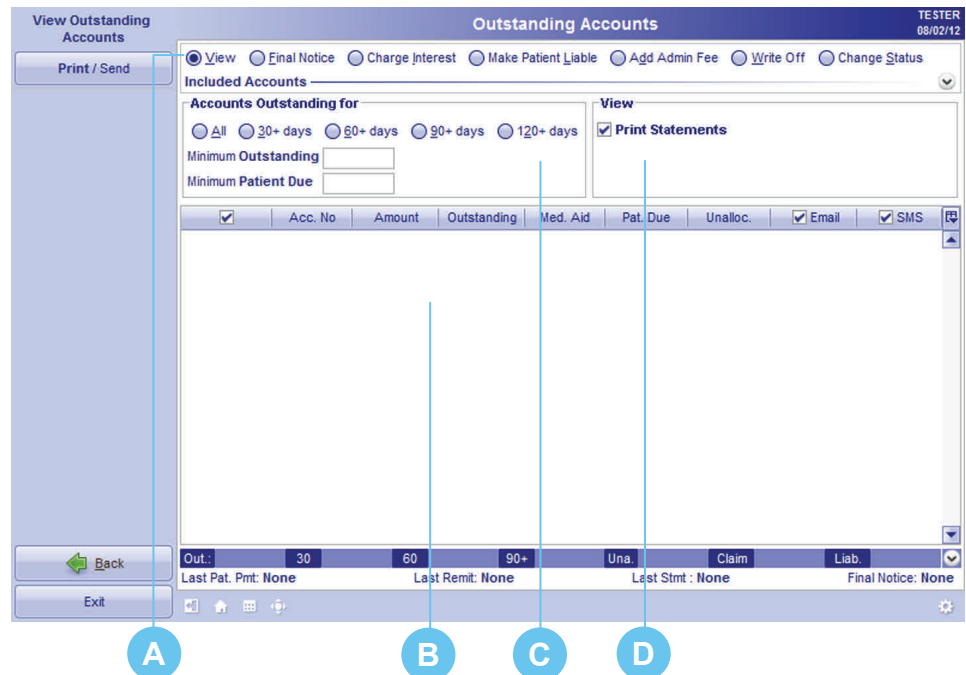
The accounts that successfully fill the filter criteria selected above will be displayed here. There is a record for each account which displays all the financial information of the account. Here the operator can pick and select the account to be processed from the list.
- C

Accounts outstanding for.

The operator is able to filter the available accounts based on a specific time period that the account has had outstanding bills for. Alternatively there are input fields where the operator can filter and only show accounts based on a Rand value amount which is outstanding on the accounts. Selecting "All" will not use a time period filter and will show all accounts.
- D

Function criteria.

On selecting this function, the criteria for the function will be displayed here. The criteria for the function will process the selected accounts in different ways.



- A

Included accounts.

This section enables the operator to select whether to show or hide accounts by a specific account status. Alternatively the operator is able to select account types. This will then only show accounts which fall under the selected type and if any, the selected account status. Account types are set up by the operator in the MedEDI administrator.
- B

Change account status.

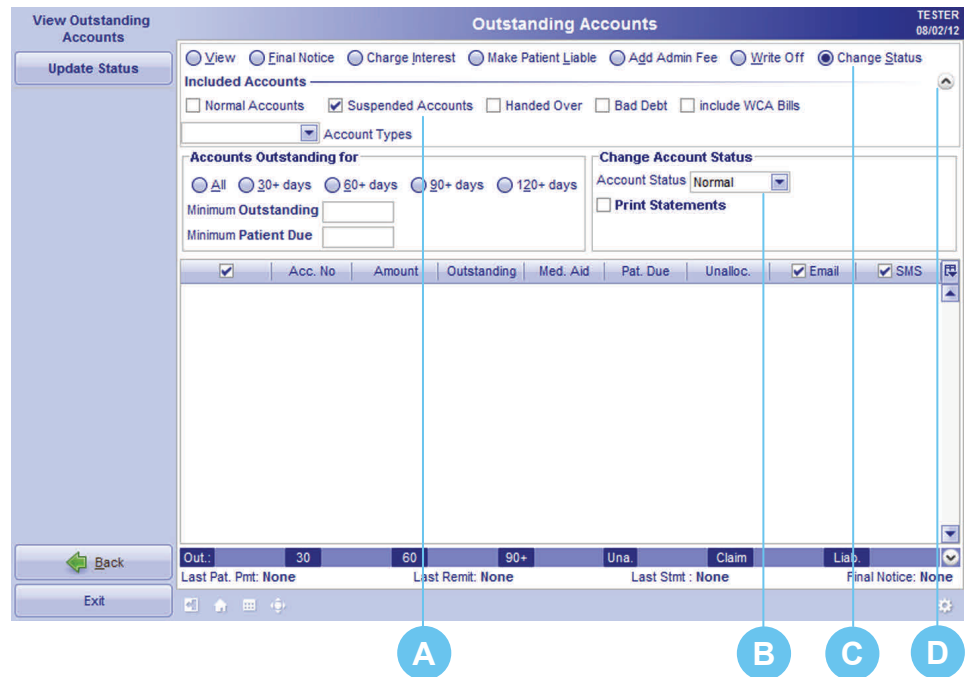
In this example the criteria for the selected operation enables the operator to select the account status to change the selected accounts to. There is also a function to print an account statement for each of the accounts changed by the operator. In this example, selected accounts will be changed to normal.
- C

Change status.

Selecting these options will change the operation the user is carrying out. The change status operation will change the operation criteria to alternative processing options. This enables the operator to carry out the desired processing on the selected accounts.
- D

Expand menu.

By clicking this button, further filter options will be available.



Outstanding accounts.

Notes:

A

All.

When selecting all, all of the accounts which satisfy other filter options will be displayed as there is no date-range selected. In this example, all accounts which have been flagged as suspended are displayed.

B

Account record.

The accounts which satisfy the user-selected filter criteria will have a record displayed. Each record contains all relevant financial details regarding that account. The operator can double click the record to be navigated to the 'View Account History' screen, where the operator can view the outstanding bills on that account.

C

Financial details.

On selection of an account record, the financial details of that account will be displayed here. The operator is able to expand the financial break-down box to reveal full details of the type of outstanding amount on that account and for how long it has been outstanding.

D

Display options.

Selecting this option will show a list of available display options. The operator can click to select which columns to display. These settings customize how much information is displayed for each account record.

View Outstanding Accounts TESTER 08/02/12

Update Status

☐ View
 ☐ Final Notice
 ☐ Charge Interest
 ☐ Make Patient Liab
 ☐ Add Admin Fee
 ☐ Write Off
 ☒ Change Status

Included Accounts

☐ Normal Accounts
 ☒ Suspended Accounts
 ☐ Handed Over
 ☐ Bad Debt
 ☐ Include WCA Bills

Account Types

Accounts Outstanding for

☒ All
 ☐ 30+ days
 ☐ 60+ days
 ☐ 90+ days
 ☐ 120+ days

Minimum Outstanding:
 Minimum Patient Due:

Change Account Status

Account Status:

☐ Print Statements

	Acc. No	Amount	Outstanding	Med. Aid	Pat. Due	Unalloc.	Email	SMS
☒	606	316.84	316.84	0.00	316.84	0.00	☐	☐
☐	619	1,628.56	1,628.56	0.00	1,628.56	0.00	☐	☐
☐	756	1,479.02	1,479.02	0.00	1,479.02	0.00	☐	☐
☐	1076	864.00	864.00	0.00	864.00	0.00	☐	☐
☐	3810	961.30	961.30	0.00	961.30	0.00	☐	☐
☐	3937	948.14	948.14	0.00	948.14	0.00	☐	☐
☐	4017	3,639.42	3,639.42	0.00	3,639.42	0.00	☐	☐
☐	4105	560.08	560.08	0.00	560.08	0.00	☐	☐

Out.: 316.84 30 60 90+ 316.84 Una. Claim 0.00 Liab. 316.84
 Last Pat. Pmt: 12 Dec 08 (R 100.00) Last Remit: None Last Stmt: 18 Jul 11 Final Notice: 15 Apr 09

Back Exit

A

Select all accounts.

This option allows the operator to select or de-select all available account records. Only selected accounts will then be processed by the selected options.

B

Select specific accounts.

The operator is able to select individual accounts to be processed by simply clicking on and ticking the tick box.

C

E-mail.

If this option is selected when processing the account, the account holder will be sent an e-mail regarding the process, together with an account statement. A pop up window will be displayed allowing the operator to enter content to the e-mail. The e-mail used by the operator will be the one selected under the account settings.

D

SMS.

If this option is selected when processing this account, an SMS will be sent to the number set up in the account settings. The operator will have a pop up window where they can enter the SMS message to be sent. The SMS functionality needs to be set up in order to be able to carry out this function.

View Outstanding Accounts TESTER 08/02/12

Update Status

☐ View
 ☐ Final Notice
 ☐ Charge Interest
 ☐ Make Patient Liab
 ☐ Add Admin Fee
 ☐ Write Off
 ☒ Change Status

Included Accounts

☐ Normal Accounts
 ☒ Suspended Accounts
 ☐ Handed Over
 ☐ Bad Debt
 ☐ Include WCA Bills

Account Types

Accounts Outstanding for

☒ All
 ☐ 30+ days
 ☐ 60+ days
 ☐ 90+ days
 ☐ 120+ days

Minimum Outstanding:
 Minimum Patient Due:

Change Account Status

Account Status:

☐ Print Statements

	Acc. No	Amount	Outstanding	Med. Aid	Pat. Due	Unalloc.	Email	SMS
☒	606	316.84	316.84	0.00	316.84	0.00	☐	☐
☒	619	1,628.56	1,628.56	0.00	1,628.56	0.00	☐	☐
☒	756	1,479.02	1,479.02	0.00	1,479.02	0.00	☐	☐
☒	1076	864.00	864.00	0.00	864.00	0.00	☐	☐
☒	3810	961.30	961.30	0.00	961.30	0.00	☐	☐
☒	3937	948.14	948.14	0.00	948.14	0.00	☐	☐
☒	4017	3,639.42	3,639.42	0.00	3,639.42	0.00	☐	☐
☒	4105	560.08	560.08	0.00	560.08	0.00	☐	☐

Out.: 316.84 30 60 90+ 316.84 Una. Claim 0.00 Liab. 316.84
 Last Pat. Pmt: 12 Dec 08 (R 100.00) Last Remit: None Last Stmt: 18 Jul 11 Final Notice: 15 Apr 09

Back Exit

Click, 'Update Status' to continue.

Completed.

Notes:

A Confirmation. The confirmation screen will display details of how many accounts the operator is about to change. At this point the operator can confirm to proceed and change the status of the selected accounts, alternatively to make no changes and return to the outstanding accounts screen.

View Outstanding Accounts

Outstanding Accounts

TESTER 08/02/12

Update Status

View Final Notice Charge Interest Make Patient Liable Add Admin Fee Write Off **Change Status**

Included Accounts

☐ Normal Accounts ☒ Suspended Accounts ☐ Handed Over ☐ Bad Debt ☐ Include WCA Bills

Account Types

Accounts Outstanding for:

☒ All ☐ 30+ days ☐ 60+ days ☐ 90+ days ☐ 120+ days

Minimum Outstanding

Change Account Status

Account Status: Normal

☐ Print Statements

Completed

The accounts you selected have now been updated with a status of Normal

OK

☐	3937	948.14	948.14	0.00	948.14	0.00	☐	☐
☐	4017	3,639.42	3,639.42	0.00	3,639.42	0.00	☐	☐
☐	4105	560.08	560.08	0.00	560.08	0.00	☐	☐

Out: 316.84 30 60 90+ 316.84 Una. Claim 0.00 Liab. 316.84

Last Pat. Pmt: 12 Dec 08 (R 100.00) Last Remit: None Last Stmt: 18 Jul 11 Final Notice: 15 Apr 09

Back Exit

A

Age analyses.

The entire age analyses creation screen has been changed.

These changes make the process of creating the age analyses easier to accomplish.

Over and above the graphical changes, there are numerous functional changes which enable the operator to make more customised age analyses based on their specific needs.

Age analysis.

Notes:

A Save Settings.

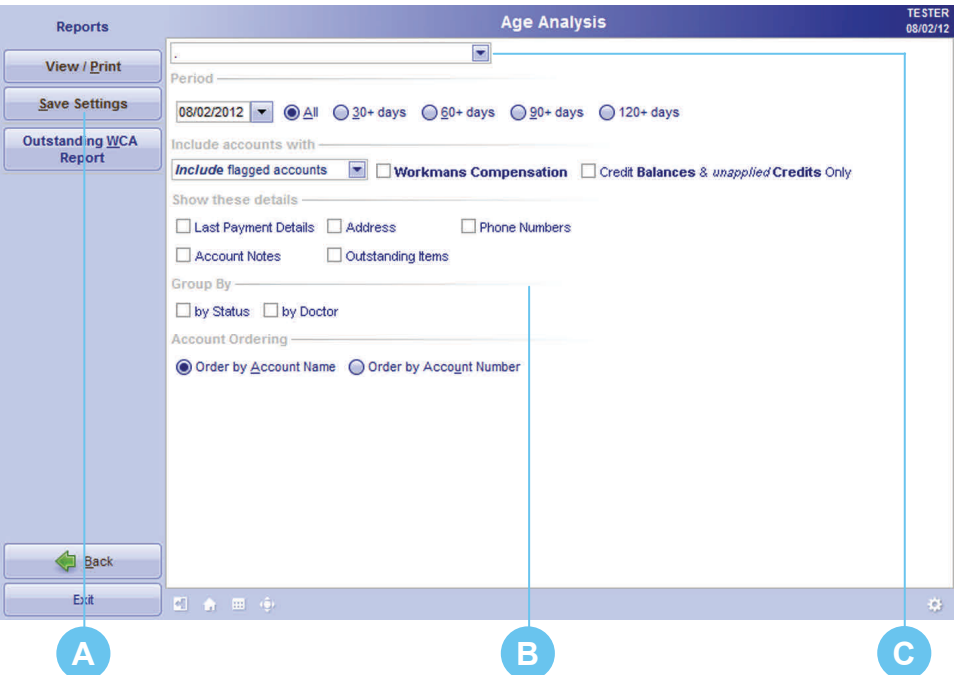
The operator is able to save any changes they have made as a new type of age analysis. When saved the operator can simply select their choice from the drop down menu and the criteria will be populated with their selections.

B Criteria.

There are multiple options available to the operator. Each option will filter and sort all the patients on system and will provide a report based on specific patients with outstanding amounts. This enables the operator to customise the age analysis to view only the specific information that they require. The sorting options will group the output data according to the preference of the operator.

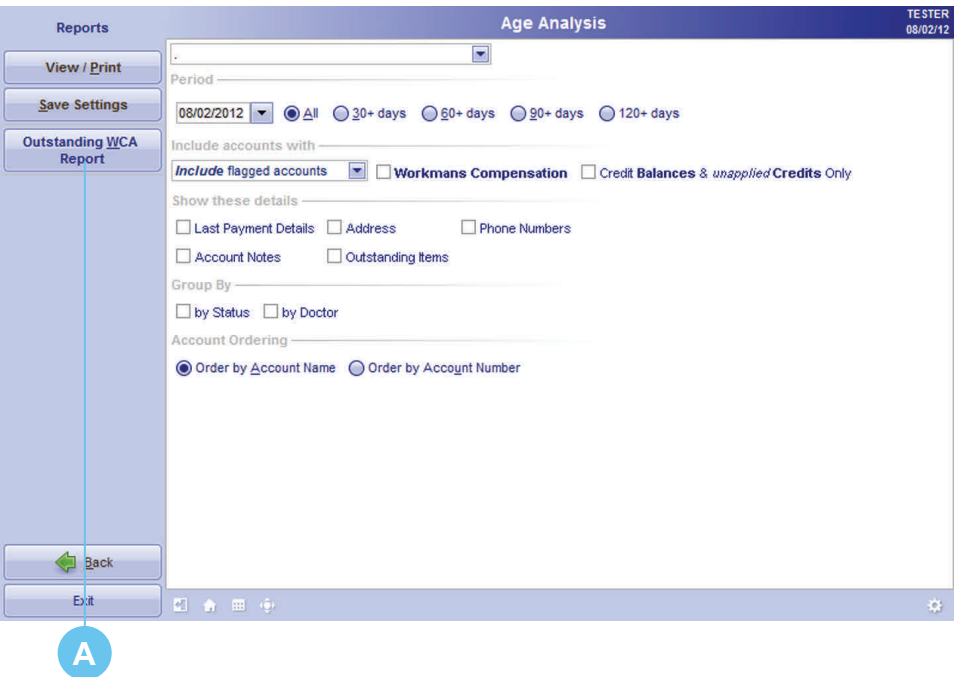
C Age analyses selection.

This drop down menu allows the operator to select the type of age analysis to use. All of the operators saved age analyses will also be located here. The default types of age analyses are preloaded within the system, and the operator can simply select and print them. The operator can select any one of the defaults, and simply alter the criteria options to customise or tweak the output. The operators customised age analyses can be saved under a new name.



A Outstanding WCA report.

This button will ignore any of the criteria the operator has selected for the age analyses and will run a separate analysis. This specific analysis will be based on only the workman's compensation claims. The document displays the account details of companies with outstanding amounts, and is presented in numerical order. Also displayed are subtotals for each company, as well as a total summary for the WCA outstanding amounts.



Age analysis.

Notes:

A Detailed debtors age analysis.

The detailed debtors age analyses will show every patient account that has an outstanding amount. It will also show how much of that outstanding is patient liable and how much is on claim to the medical scheme. This system will provide a document which shows whether it's a medical scheme or a patient that owes the practice money.

B Include accounts with.

In this section the operator can select to include or exclude patient accounts under specific scenarios. For example, the age analyses can be based on flagged accounts, or flagged accounts can be excluded or included. The operator can select whether to include or exclude workman's compensation outstanding accounts from the document, or accounts which have credit balances and unapplied credit.

C Period.

In the period section the operator can select to display patients who have outstanding amounts on a specified day. The day defaults to current day when the screen is opened. Alternatively the operator can select to display patients who have outstanding amounts in a specified date range, for example, one could show all patients who have amounts outstanding for 30 days and more. This particular selection includes an extended period beyond 30 days.

A Show these details.

Here the operator is able to select the level of detail displayed on the document. The detail will present additional information regarding each outstanding patient. For example, the operator could show the phone number relevant to the outstanding patient.

B Account ordering.

The operator is able to group the outstanding patients displayed on the age analyses by medical aid, in which case there is then a total on-claim liable amount for each medical aid displayed. Patient liable amounts are listed under "private patient". The accounts in the groupings are listed numerically by account number making for easier reference.

C Group by.

The "group by" option enables the operator to group the outstanding patient records on the document to either fulfill a different purpose, or to make it easier to view. For example the operator can group by treating doctor, which in turn shows which patients / medical aids owe that particular doctor money.

Click, 'View / Print' to continue.

Detailed debtors age analysis.

Notes:

A

Account information.

For each outstanding amount displayed on the report there is information regarding the corresponding outstanding account. This includes information on the patient to whom the debt relates. This information makes specifically references the individual who owes the practice money.

B

Outstanding information.

Information regarding the outstanding amount includes the total that is outstanding for that particular patient. If there are unallocated payments on the account they will also be displayed.

Reports Detailed Debtors Age Analysis TESTER 09/02/12

Print Document Export Document

Detailed Debtors Analysis
Debiteure Ouderdomsontled

Dr Testing

Acc No. Rek Nr.	Account Name Rekening Naam	Med Aid No. Med Fonds Nr.	Total Totaal	Unallocated VN-toegeken	Current Huidig
ALTRON (0860 445 566)					
3862	SWAN, CJ MR		1,298.68		
			Totals / Totaal	0.00	0
ANGLO VAAL (0860 445 566)					
1989	MAG, G MR		128.61		
			Totals / Totaal	0.00	0
BANKMED (0800 226 5633)					
186	BOSC, T ADV		-150.00	-150.00	
1720	SMIT, E MRS		-355.30	-355.30	
1787	RETIEF, D MR		-300.00	-300.00	
1945	ELS, M MR		-355.30	-355.30	
2050	VOSL, W MR		-788.40	-788.40	
2074	PETERSEN, AV MR		-200.00	-200.00	
2164	VAN NIEKE, MN MR		23.31		
2389	BLIGNAU, PJ MR		-355.80	-355.80	
2466	HITGE, A MR		-600.00	-600.00	
2558	BOTH, L MRS		-600.00	-600.00	
2784	TLHOBO, N MR		278.19		
2795	MAROPEN, S MRS		1,171.36		
2800	DU TOIT, J MR		-2,293.97	-2,293.97	
2837	VAN NIEKERK, J MR		-150.00	-150.00	

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A

B

A

Broken down by age.

The outstanding amounts for any particular patient are assigned to the date range in which they initially occurred. For example, an outstanding amount that is over 120 days old will be displayed in the 120 days + field. This break down by age enables the operator to view the priority of any outstanding amount.

B

Medical aid due.

In the previous software version, the total outstanding for the patient was displayed. Now the portion which is medical aid on-claim is also displayed, indicating to the operator how much the patients medical scheme owes.

C

Liable.

In the previous software version, the total outstanding for the patient was displayed. Now the portion which is patient liable is also displayed, indicating to the operator how much of the outstanding total the patient is liable for.

Reports Detailed Debtors Age Analysis TESTER 09/02/12

Print Document Export Document

Detailed Debtors Analysis
Debiteure Ouderdomsontledingsverslag

Total Totaal	Unallocated VN-toegeken	Current Huidig	30 Days 30 Dae	60 Days 60 Dae	90 Days 90 Dae	120+ Days 120+ Dae	MA Due Verskuldig	Liabe Aanspreeklik
1,298.68						1,298.68		1,298.68
0.00		0.00	0.00	0.00	0.00	1,298.68		1,298.68
128.61						128.61		128.61
0.00		0.00	0.00	0.00	0.00	128.61		128.61
-150.00	-150.00							-150.00
-355.30	-355.30							-355.30
-300.00	-300.00							-300.00
-355.30	-355.30							-355.30
-788.40	-788.40							-788.40
-200.00	-200.00							-200.00
23.31						23.31		23.31
-355.80	-355.80							-355.80
-600.00	-600.00							-600.00
-600.00	-600.00							-600.00
278.19						278.19		278.19
1,171.36						1,171.36		1,171.36
2,293.97	-2,293.97							-2,293.97
-150.00	-150.00							-150.00

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A

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C

Detailed debtors age analysis.

Notes:

A

Grouped by medical aid.

In this instance, the selection criterion displays outstanding accounts grouped by corresponding medical . This grouping also presents the total that is outstanding per medical scheme.

B

Ordered by account number.

Based on the selection criteria, the outstanding patient accounts have been ordered numerically. This ordering makes the age analysis document easier to view and reference in the event that the operator is looking for an individual patient account.

Reports Detailed Debtors Age Analysis TESTER 09/02/12

Print Document Export Document

Detailed Debtors Ana
Debiteure Ouderdomsontled

Dr Testing

Acc No. Rek Nr.	Account Name Rekening Naam	Med Aid No. Med Fonds Nr.	Total Totaal	Unallocated Vn-toegeken	Cur Hul
ALTRON (0860 445 566)					
3862	SWAN, CJ MR		1,298.68		
			ALTRON (0860 445 566) Totals / Totaal	0.00	0
ANGLO VAAL (0860 445 566)					
1989	MAG, G MR		128.61		
			ANGLO VAAL (0860 445 566) Totals / Totaal	0.00	0
BANKMED (0800 226 5633)					
186	BOSC, T ADV		-150.00	-150.00	
1720	SMIT, E MRS		-355.30	-355.30	
1787	RETIEF, D MR		-300.00	-300.00	
1945	ELS, M MR		-355.30	-355.30	
2050	VOSL, W MR		-788.40	-788.40	
2074	PETERSEN, AV MR		-200.00	-200.00	
2164	VAN NIEKE, MN MR		23.31		
2389	BLIGNAU, PJ MR		-355.80	-355.80	
2466	HITGE, A MR		-600.00	-600.00	
2558	BOTH, L MRS		-600.00	-600.00	
2784	TLHOBO, N MR		278.19		
2795	MAROPEN, S MRS		1,171.36		
2800	DU TOIT, J MR		-2,293.97	-2,293.97	
2837	VAN NIEKERK, J MR		-150.00	-150.00	

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A

B

A

By medical scheme.

This provides a summary record for each medical scheme of monies outstanding to the practice. The summary record for private patients can be found under the heading "patient due".

B

Broken down by age.

The outstanding amounts for each scheme are broken down into the date range for which they have been outstanding. This function will assist in prioritizing debt management.

Reports Detailed Debtors Age Analysis TESTER 09/02/12

Print Document Export Document

Detailed Debtors Analysis
Debiteure Ouderdomsontledingsverslag

DR TESTING

Debtor Debiteure	Total	Unallocated	Current	30 Days	60 Days
Practice					
1. PATIENT DUE	232,973.42	-133,140.95	1,507.81	0.00	3,188.1
BANKMED	352.40	0.00	0.00	0.00	0.0
RESTMED	2,439.80	0.00	0.00	0.00	0.0
BONTAS	948.00	0.00	0.00	0.00	0.0
COMMED	70.30	0.00	0.00	0.00	0.0
COMPCARE	1,004.80	0.00	0.00	0.00	0.0
DISCOVERY	124,068.79	0.00	753.10	0.00	21,528.8
EDCON	352.40	0.00	0.00	0.00	0.0
FEDHEALTH	784.32	0.00	0.00	0.00	0.0
GEMS	16,226.50	0.00	0.00	0.00	0.0
HOSMED	502.40	0.00	0.00	0.00	0.0
HOSMED ENABLED	1,902.00	0.00	0.00	0.00	0.0
LIBERTY CARECROSS	502.40	0.00	0.00	0.00	0.0
LIBERTY MEDICAL	19,178.80	0.00	0.00	0.00	0.0
MEDHELP	3,688.40	0.00	0.00	0.00	0.0
MEDSHIELD	592.60	0.00	0.00	0.00	0.0
MOMENTUM HEALTH	69,431.38	0.00	0.00	0.00	0.0
NEDGROUP	1,724.00	0.00	0.00	0.00	0.0
OPMED	502.40	0.00	0.00	0.00	0.0
OXYGEN(DISC)	352.40	0.00	0.00	0.00	352.4
POLMED	2,865.90	0.00	0.00	0.00	0.0
PRIVATE PATIENT	316.40	0.00	0.00	0.00	0.0
PROFIMED	502.40	0.00	0.00	0.00	0.0
RETAIL MEDICAL AID	498.00	0.00	0.00	0.00	0.0
SAMVUMED	397.80	0.00	0.00	0.00	0.0
SASOLMED	1,737.60	0.00	0.00	0.00	0.0
SPECTRAIMED	1,095.00	0.00	0.00	0.00	0.0
WORKMANS COMPENSATION	6,020.68	0.00	0.00	0.00	250.2

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B

Detailed debtors age analysis.

Notes:

A

Final totals.

The final totals clearly display the full amount that is owing to the practice. These final totals are also divided into age groupings showing the totals outstanding and how long they have been outstanding for.

Reports

Detailed Debtors Age Analysis

TESTER
09/02/12

Print Document

Export Document

33

75%

Debtor	Total	Unallocated	Current	30 Days	60 Days
Deb Name	Totals	Unallocated	Unpaid	30 Day	60 Day
Practice					
1. PATIENT DUE	232,973.42	-133,140.95	1,507.81	0.00	3,188.00
BANKMED	352.40	0.00	0.00	0.00	0.00
BANKMED	2,436.80	0.00	0.00	0.00	0.00
BONITAS	948.00	0.00	0.00	0.00	0.00
COMMED	70.30	0.00	0.00	0.00	0.00
COMPCARE	1,004.80	0.00	0.00	0.00	0.00
DISCOVERY	124,065.79	0.00	753.10	0.00	21,528.00
EDCON	352.40	0.00	0.00	0.00	0.00
FEDHEALTH	784.32	0.00	0.00	0.00	0.00
GEMS	16,228.50	0.00	0.00	0.00	0.00
HOSMED	502.40	0.00	0.00	0.00	0.00
HOSMED ENABLEMED	1,902.00	0.00	0.00	0.00	0.00
LIBERTY CARECROSS	502.40	0.00	0.00	0.00	0.00
LIBERTY MEDICAL	19,178.80	0.00	0.00	0.00	0.00
MEDSHIELD	3,695.40	0.00	0.00	0.00	0.00
MEDSHIELD	592.60	0.00	0.00	0.00	0.00
MOMENTUM HEALTH	69,431.38	0.00	0.00	0.00	0.00
NEDGROUP	1,724.00	0.00	0.00	0.00	0.00
OPMED	502.40	0.00	0.00	0.00	0.00
OXYGEN(DISC)	352.40	0.00	0.00	0.00	352.40
POLMED	2,865.90	0.00	0.00	0.00	0.00
PRIVATE PATIENT	316.40	0.00	0.00	0.00	0.00
PROFEMED	502.40	0.00	0.00	0.00	0.00
RETAIL MEDICAL AID	488.00	0.00	0.00	0.00	0.00
SAMWUMED	397.80	0.00	0.00	0.00	0.00
SASOLMED	1,737.60	0.00	0.00	0.00	0.00
SPECTRAMEID	1,095.00	0.00	0.00	0.00	0.00
WORKMANS COMPENSATION	8,000.86	0.00	0.00	0.00	250.00
ZINGWE PRIMECURE(DISC)	502.40	0.00	0.00	0.00	0.00
Practice Dr Totals / Total	491,526.67	-133,140.95	2,260.91	0.00	25,319.00
Totals / Total	491,526.67	-133,140.95	2,260.91	0.00	25,319.00
		-27.09 %	0.46 %	0.00 %	5.15 %

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The MemberCheck enables you not only to compare your patients information against what is held by their medical scheme but also allows you to import the medical scheme information into your system.

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